How to set up a letter or CV template

Relates to: Maintenance → Agency Setup → Document Templates tab.

- Letter, fax header and CV templates are set up here. Click the radio button required.
- To add a new Template click the **New** button.
- Or Highlight and Expand to edit an existing one.
- The current Template selection list is brought up. If a new template is to be based on an existing one, highlight the appropriate one, otherwise leave at **No Template**.
- Click **Create new document from selected template** button. Word is opened within IQX.
- To make a new template from an existing document outside IQX click the **Load from existing Word document button** and Browse to the document.
- To add Fields to the Template click **File**, **Insert Fields** to bring up the Insert Fields box, and **drag** onto the document.
- **Drag** the fields from the box to the Template. They will go to the current cursor position. (Either drag them all in and then move them to the right positions or reposition the cursor between each drag)
- When the Template is saved enter a descriptive name in the prompt box. **Exit** will close Word and return to IQX.
- Templates can be open to all or set up for a branch. The branch connection can be changed.

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